# CANADIAN AIF SIGNING SYSTEM USER MANUAL

## COMPLETE DOCUMENT FOR ALL USERS (UK VERSION)

**VERSION 2.3**

**MAY 26, 2014**

LLOYD'S

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# HOW TO REGISTER TO THE AIF SIGNING SYSTEM

**The following section is intended for all users.**

In order to use the AIF Signing System, users will need to be registered as either a Super User or User.

The Super User is responsible for adding and deleting Users as appropriate.

### 1.1 Web address

The AIF Signing System is a web-based system and can be located at the following address:

https://telussecurecontracts.com

Users will need to ensure they have Adobe Flash version 10 or higher installed in order to use the system. Contact your IT department for more information on Adobe Flash.

### 1.2 Registering as a Super User

To register as a Super User you need to have been assigned as a Super User by your company. If this is the case, you will receive an e-mail from the AIF informing you of such.

Super Users have access to all insuring contracts submitted by their company.

If a company's Super User departs the entity, a new Super User must be assigned. A new Super User can be assigned by submitting the new Super User's name and e-mail address to the Canadian AIF at canadianaif@lloyds.com.

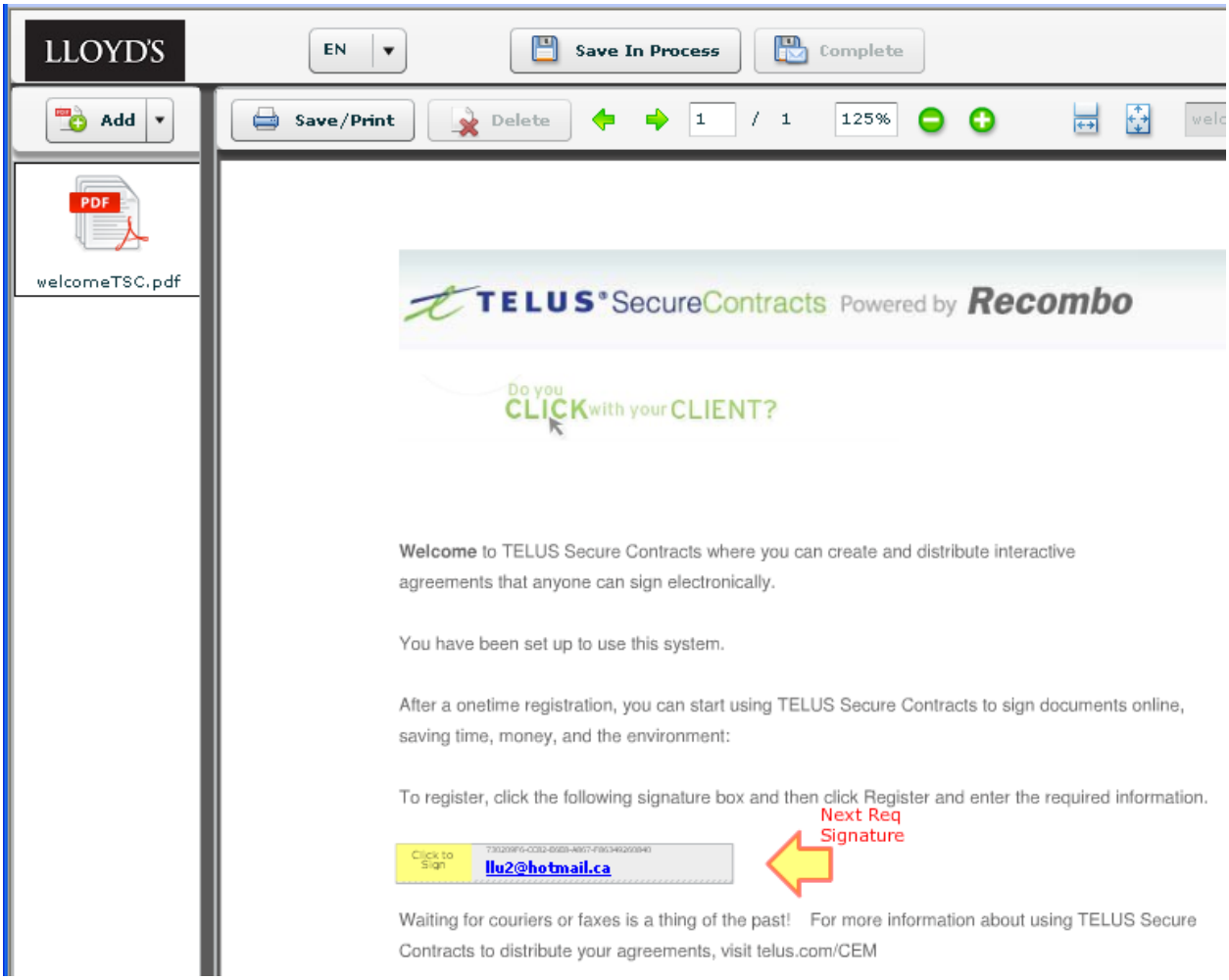
It is recommended that London brokers and non-Canadian domiciled brokers know the identity of their Canadian broker, and vice versa.

Super Users are also responsible for saving a copy of all contracts to their computer system.

Once you have been set up as a Super User in the Canadian AIF System, you will receive an e-mail from the System requesting that you register as a Super User.

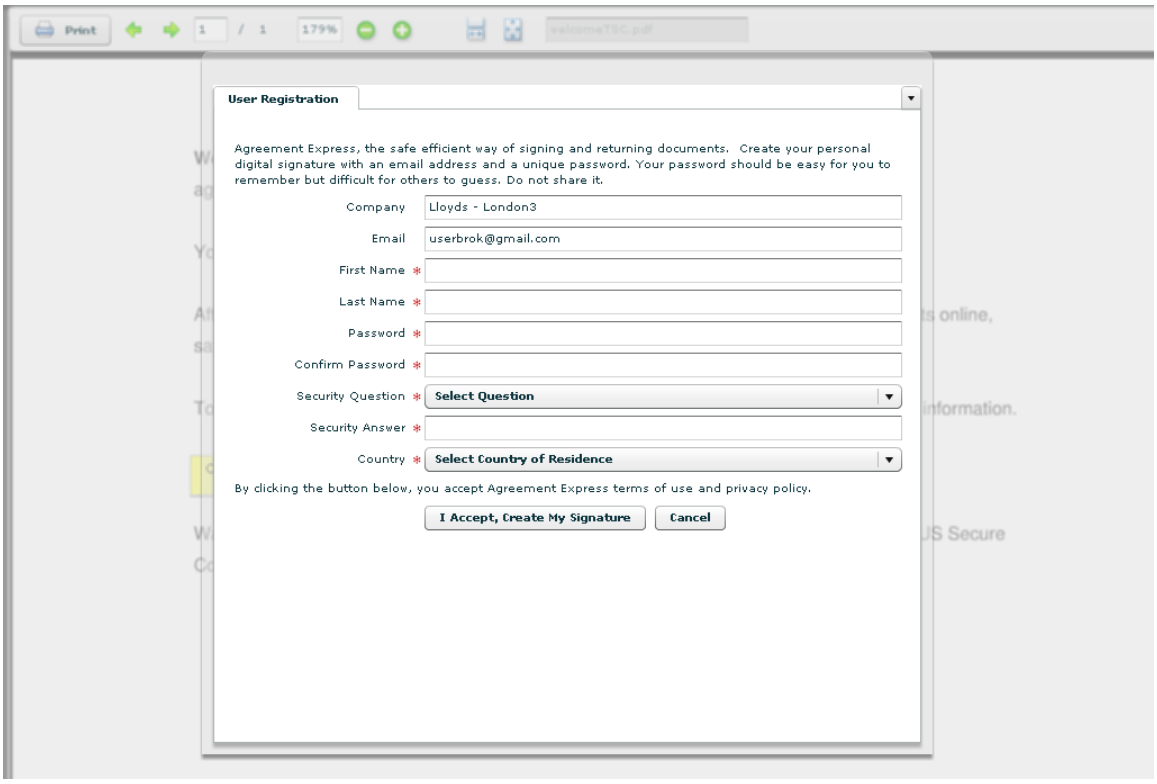
Click on the "welcomeTSC.pdf" link within the e-mail.

The following screen will open in a new window or tab, depending on your browser.


LLOYD'S
EN
Save In Process
Complete
Add
Save/Print
Delete
1 / 1
125%
PDF
welcomeTSC.pdf
TELUS SecureContracts Powered by Recombo
Do you CLICK with your CLIENT?
Welcome to TELUS Secure Contracts where you can create and distribute interactive agreements that anyone can sign electronically.
You have been set up to use this system.
After a onetime registration, you can start using TELUS Secure Contracts to sign documents online, saving time, money, and the environment:
To register, click the following signature box and then click Register and enter the required information.
Next Req Signature
Click to Sign
llu2@hotmail.ca
Waiting for couriers or faxes is a thing of the past! For more information about using TELUS Secure Contracts to distribute your agreements, visit telus.com/CEM

Click the signature box containing your e-mail address highlighted in blue.

A new window will be provided requesting additional information in order to complete the user's registration.


Print
User Registration
Agreement Express, the safe efficient way of signing and returning documents. Create your personal digital signature with an email address and a unique password. Your password should be easy for you to remember but difficult for others to guess. Do not share it.
Company
Lloyds - London3
Email
userbrok@gmail.com
First Name
Last Name
Password
Confirm Password
Security Question
Select Question
Security Answer
Country
Select Country of Residence
By clicking the button below, you accept Agreement Express terms of use and privacy policy.
I Accept, Create My Signature
Cancel

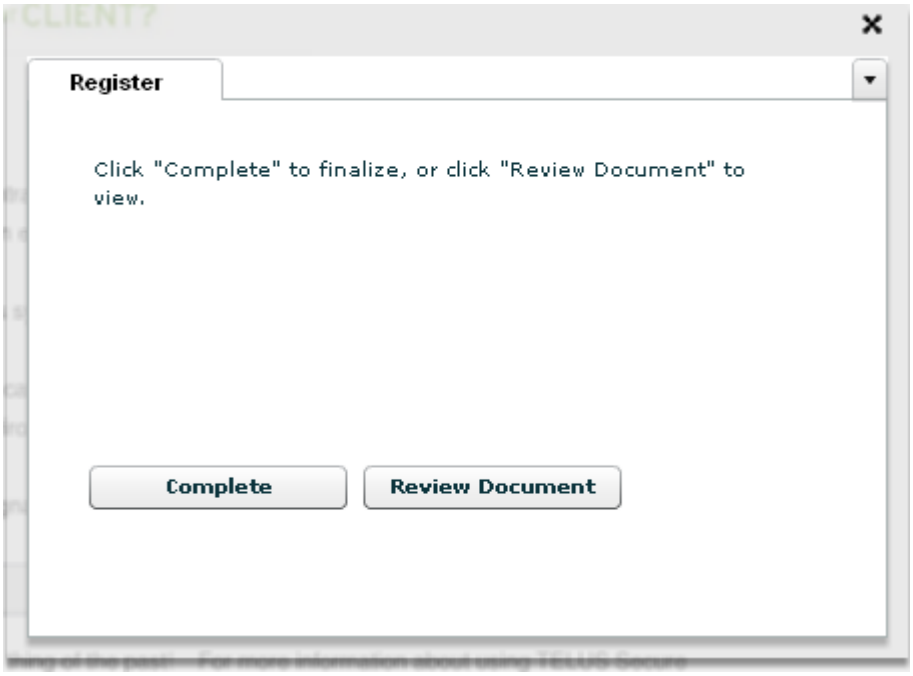
All fields marked with an asterisk ( * ) are required.

You will be asked to provide an answer to a security question. The answer to this security question will be used to identify you in the event that you forget your password.

After filling in the fields click “I Accept, Create My Signature.”

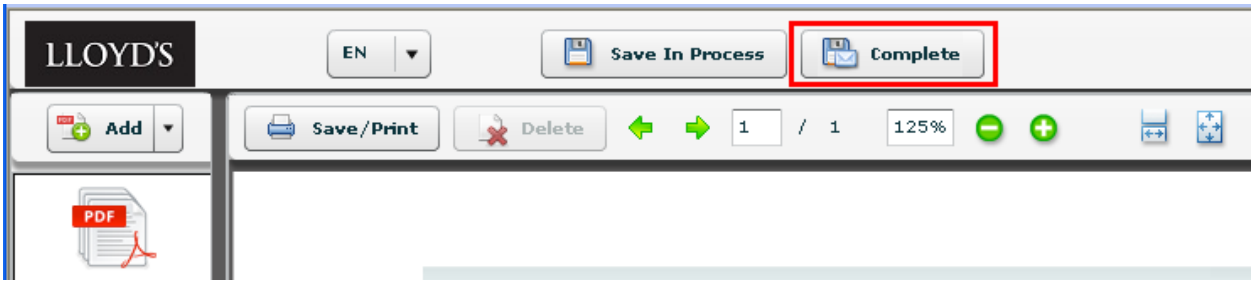
If you do not wish to register now, click “Cancel.” You will be able to register at a later time by accessing the e-mail and following the steps outlined above.

Clicking on “I Accept, Create My Signature” will open a new window. Click “Complete” to complete registration.




If you are not ready to complete registration, click “Review Document.”

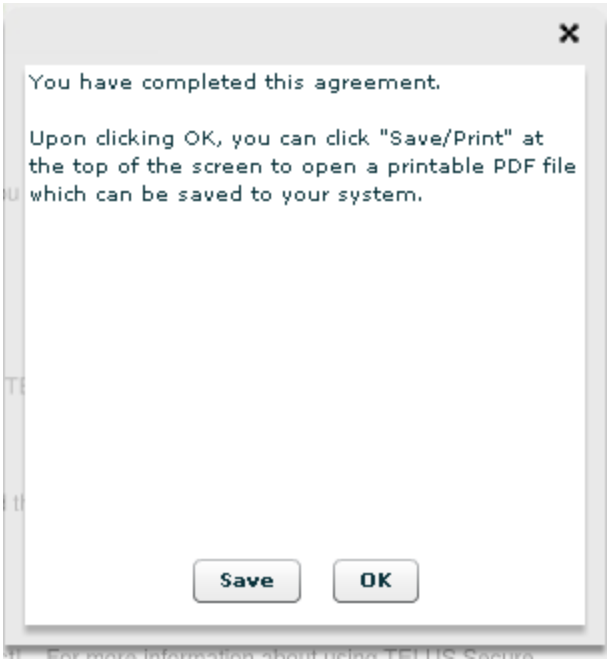
When you are ready to complete registration, click the “Complete” button at the top of the screen.




Registration is not complete until “Complete” has been clicked.

Clicking “Complete” automatically notifies the Canadian AIF that you have completed registration. Nothing is saved to your computer or system.

Upon clicking “Complete,” a final window will appear. If you wish to save a copy of the signed registration form, click “Save”. If you wish to exit the registration form without saving, click “OK.”


You have completed this agreement.
Upon clicking OK, you can click "Save/Print" at the top of the screen to open a printable PDF file which can be saved to your system.
Save
OK

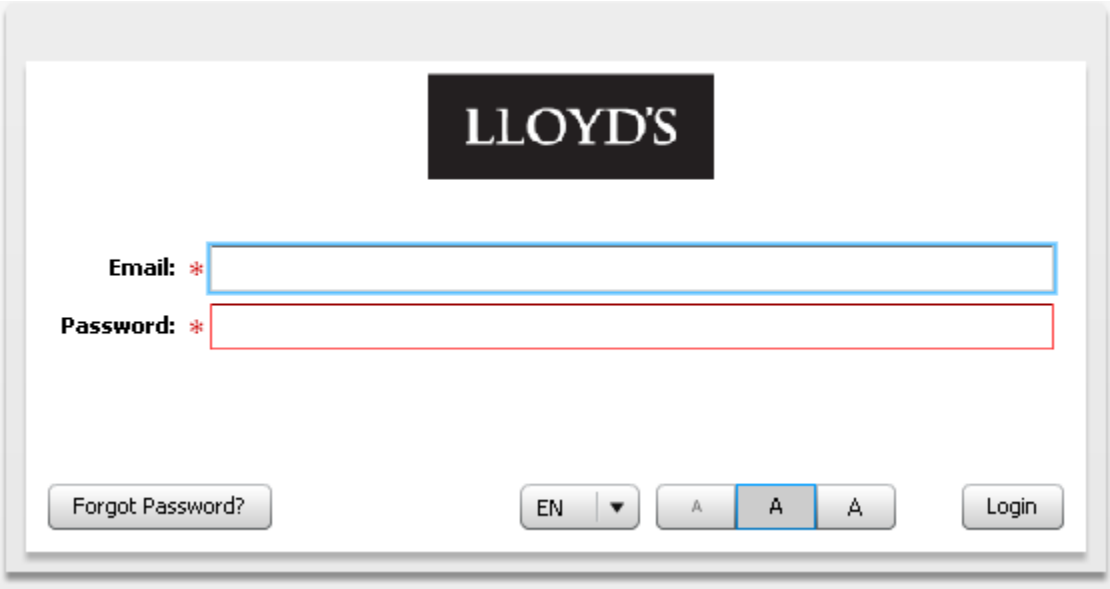
Once registration is complete you will receive an e-mail from the Canadian AIF confirming that you have successfully registered to the AIF Signing System.

A particular e-mail address can only be used once to register in a single company.

You will not be requested to provide any additional documents.

Having registered, you may now access the AIF Signing System at www.telusecurecontracts.com.

You will be prompted to login using your e-mail address and password.

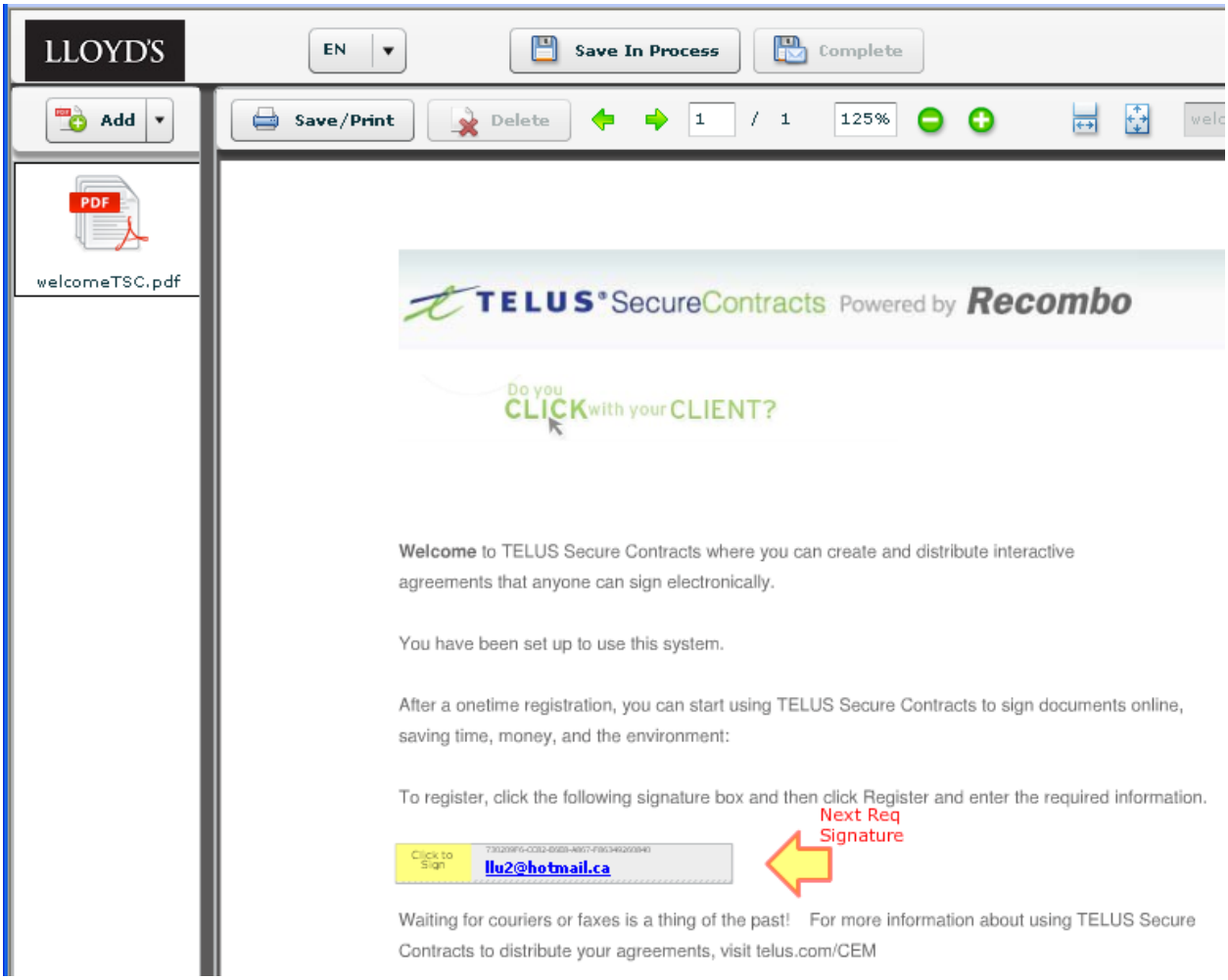


### 1.3 Registering as a User

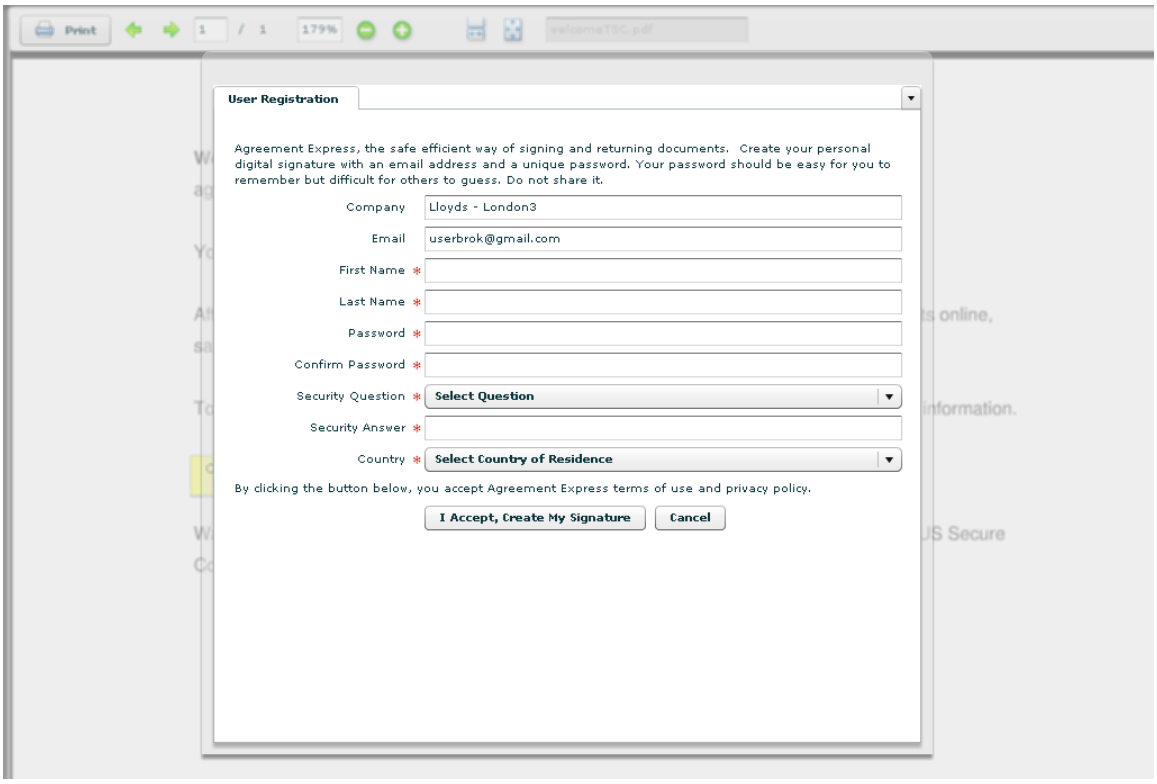
Once a Super User has added you to the system as a User, you will receive an e-mail from the Canadian AIF System requesting that you register as a User.

You will be prompted to click on the "welcomeTSC.pdf" link within the e-mail.

The following screen will open in a new window or tab, depending on your browser.


LLOYD'S
EN
Save In Process
Complete
Add
Save/Print
Delete
1 / 1
125%
PDF
welcomeTSC.pdf
TELUS SecureContracts Powered by Recombo
Do you CLICK with your CLIENT?
Welcome to TELUS Secure Contracts where you can create and distribute interactive agreements that anyone can sign electronically.
You have been set up to use this system.
After a onetime registration, you can start using TELUS Secure Contracts to sign documents online, saving time, money, and the environment:
To register, click the following signature box and then click Register and enter the required information.
Next Req Signature
Click to Sign
llu2@hotmail.ca
Waiting for couriers or faxes is a thing of the past! For more information about using TELUS Secure Contracts to distribute your agreements, visit telus.com/CEM

Click the signature box containing your e-mail address highlighted in blue and complete the information in the new window to complete the registration process.


Print
User Registration
Agreement Express, the safe efficient way of signing and returning documents. Create your personal digital signature with an email address and a unique password. Your password should be easy for you to remember but difficult for others to guess. Do not share it.
Company
Lloyds - London3
Email
userbrok@gmail.com
First Name
Last Name
Password
Confirm Password
Security Question
Select Question
Security Answer
Country
Select Country of Residence
By clicking the button below, you accept Agreement Express terms of use and privacy policy.
I Accept, Create My Signature
Cancel

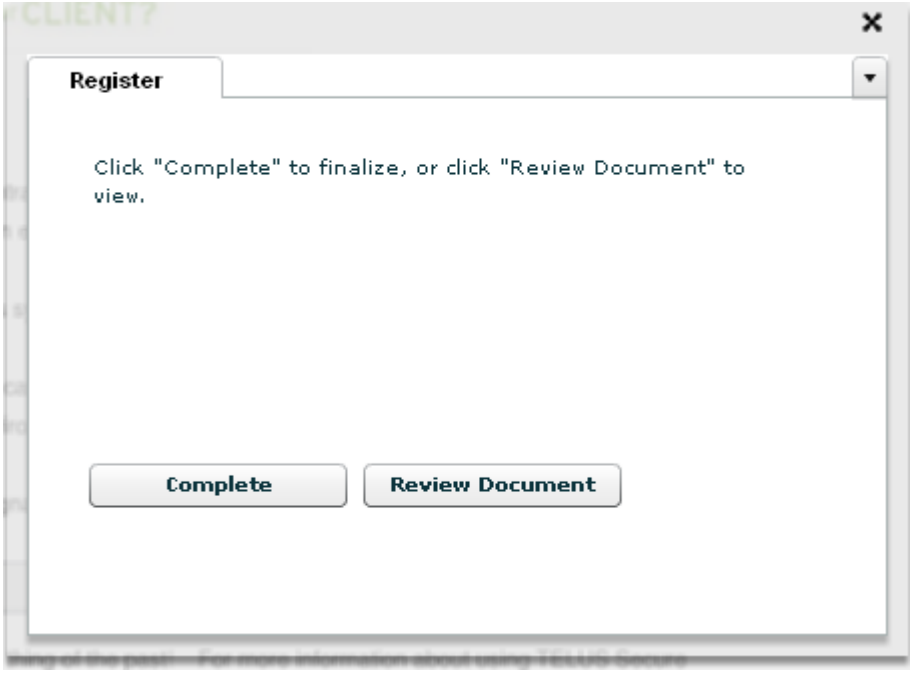
All fields marked with an asterisk ( * ) are required.

You will be asked to provide an answer to a security question. The answer to this security question will be used to identify you in the event that you forget your password.

After filling in the fields click “I Accept, Create My Signature.”

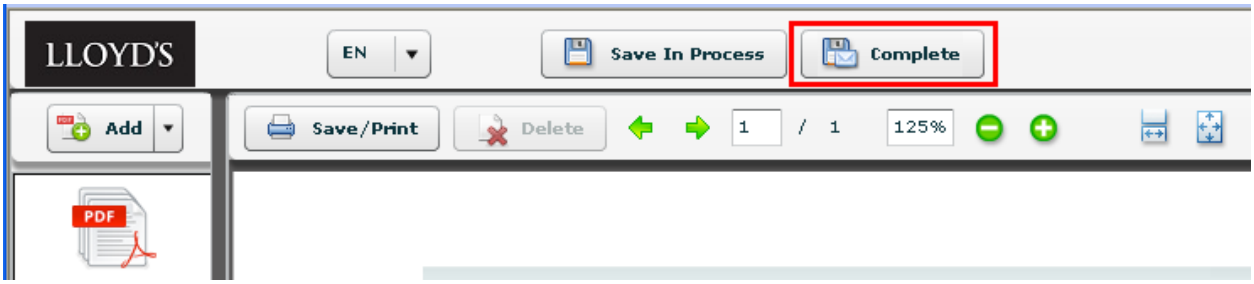
If you do not wish to register now, click “Cancel.” You will be able to register at a later time by accessing the e-mail and following the steps outlined above.

Clicking on “I Accept, Create My Signature” will open a new window. Click “Complete” to complete registration.




If you are not ready to complete registration, click on “Review Document.”

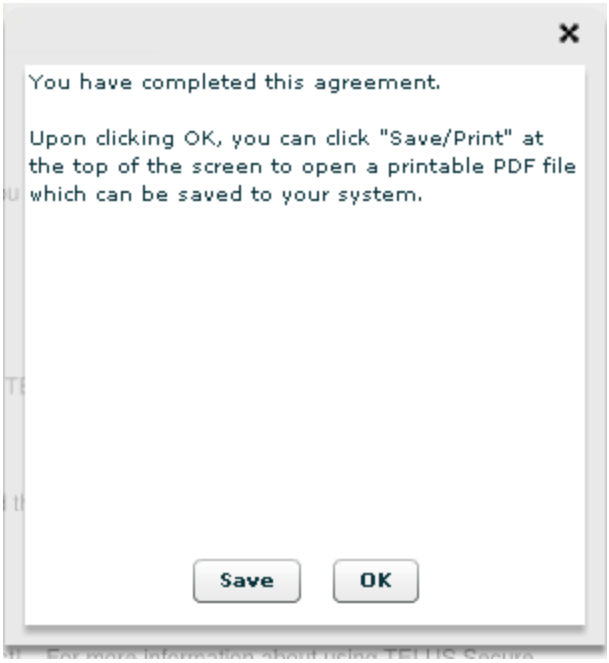
When you are ready to complete registration, click on the “Complete” button at the top of the screen.




Registration is not complete until “Complete” has been clicked.

Clicking “Save and Send” automatically notifies the Canadian AIF that you have completed registration. You will receive an e-mail from the Canadian AIF confirming that you have successfully registered to the AIF Signing System.

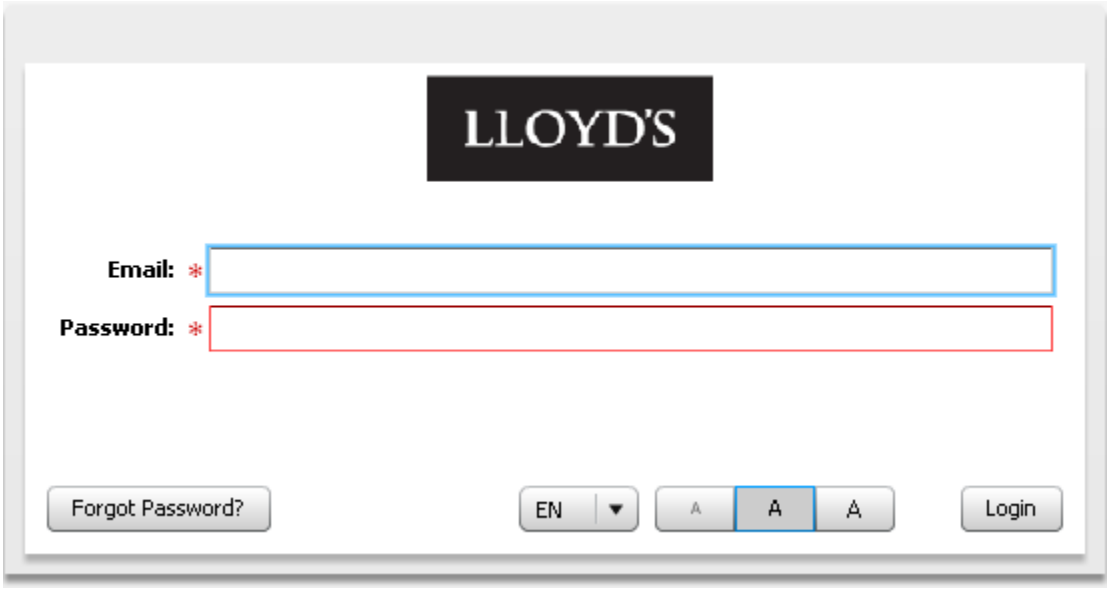
Upon clicking “Complete,” a final window will appear. If you wish to save a copy of the signed registration form, click “Save”. If you wish to exit the registration form without saving, click “OK.”


You have completed this agreement.
Upon clicking OK, you can click "Save/Print" at the top of the screen to open a printable PDF file which can be saved to your system.
Save
OK

A particular e-mail address can only be used once to register in a single company.

Having registered, you may now access the AIF Signing System at www.telussecurecontracts.com.

You will be prompted to login using your e-mail address and password.



# HOW TO ADD AND MANAGE USERS

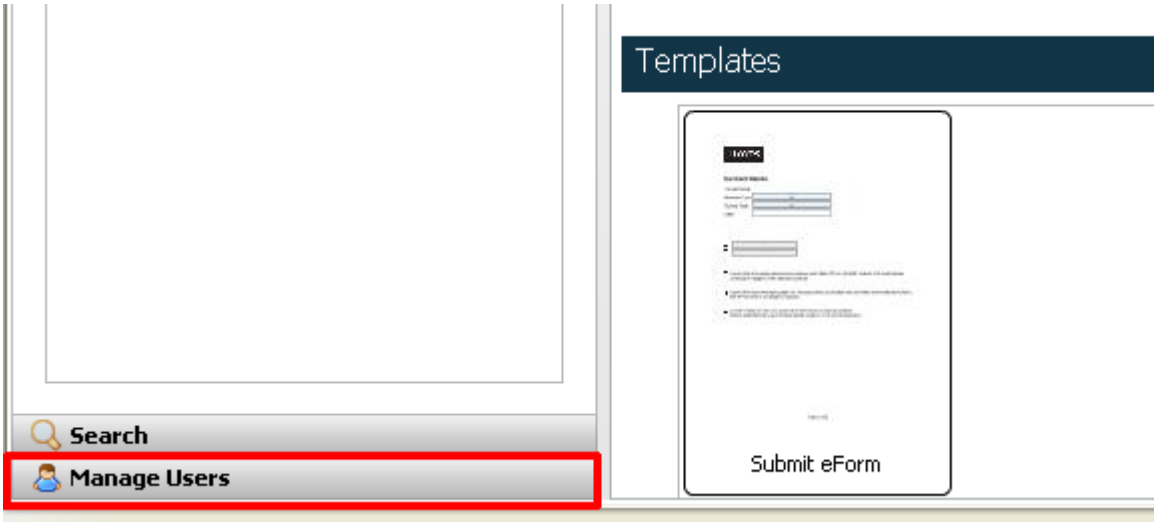
**The following section is intended for Super Users**

A new User can only be added by a Super User.

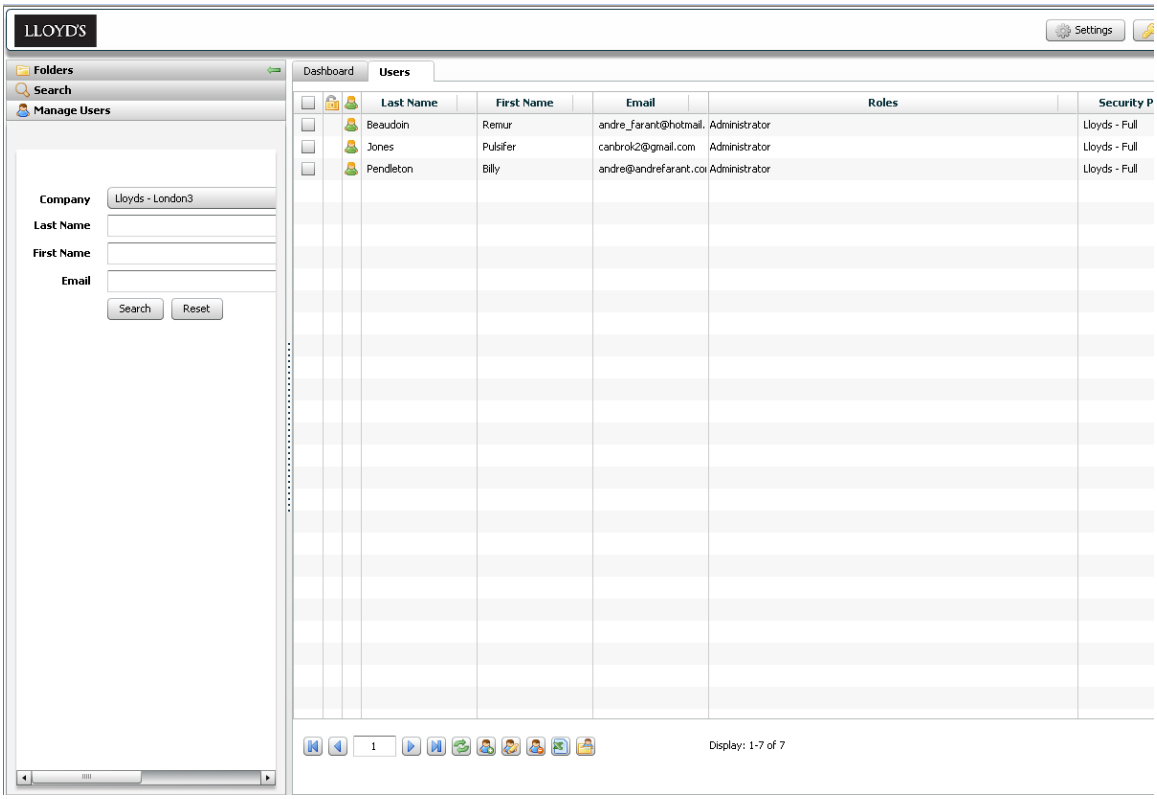
There is no limit to the number of Users within a company.

## 2.1 Adding a User

From the Home Page, select “Manage Users” on the left hand side of the screen.

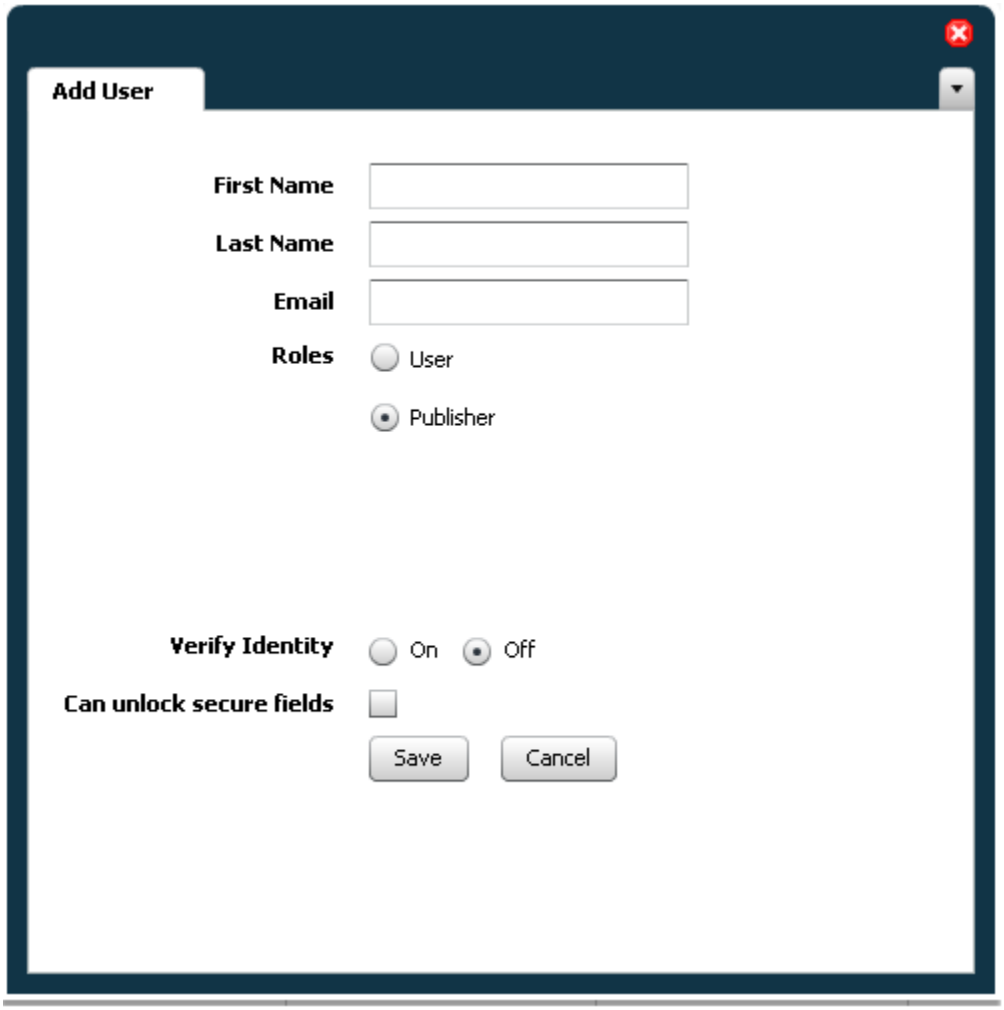



Opening the “Manage Users” section will open a new tab in the Dashboard titled Users.




Click on the “Add User” icon ( ) located at the bottom of the Users section.

This will open a new window as follows:




Complete the requested information but noting the following:

Ensure only “Publisher” is selected.

The “Verify Identity” checkboxes are not used and should remain “Off.”

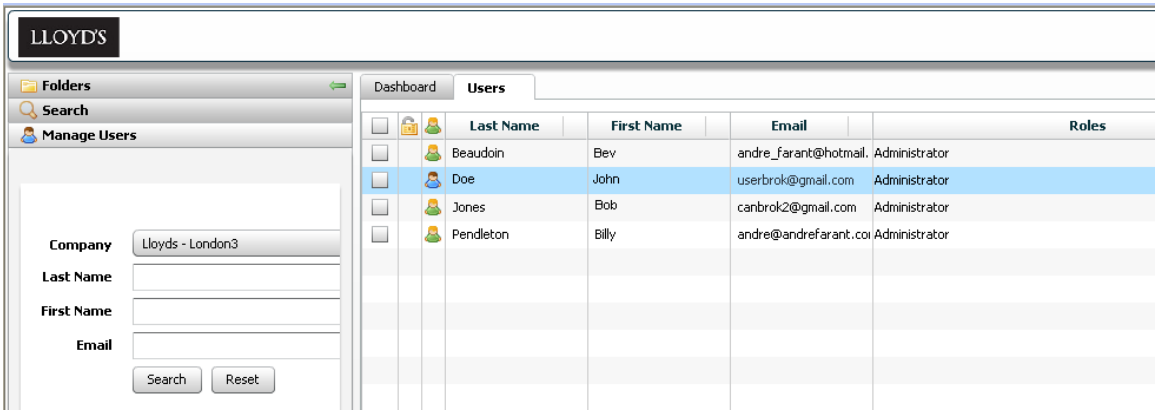
The “Can unlock secure fields” checkbox is not used and should remain unselected.

Click “Save.” A window will open confirming that you have successfully added a new User.

Click “OK.”

On completion, an e-mail will be sent from the Canadian AIF System to the new User prompting them to complete registration.

The new User will appear in the Users section.




Each User will be required to register before they will be given access to the AIF Signing System.

A new User's icon ( ) remains blue until the User has registered.

Once the new User has registered, the User's icon will appear green ( ).

### 2.2 Adding a Super User

New Super Users can only be added by Canadian AIF. To request the creation of a Super User please e-mail canadianaif@lloyds.com.

### 2.3 Managing Users

Only Super Users have access to the "Manage Users" section.

When this section is selected, you will be able to perform user management functions by selecting the icons at the bottom of the screen.

# HOW TO SUBMIT A CONTRACT

**The following section is intended for all users.**

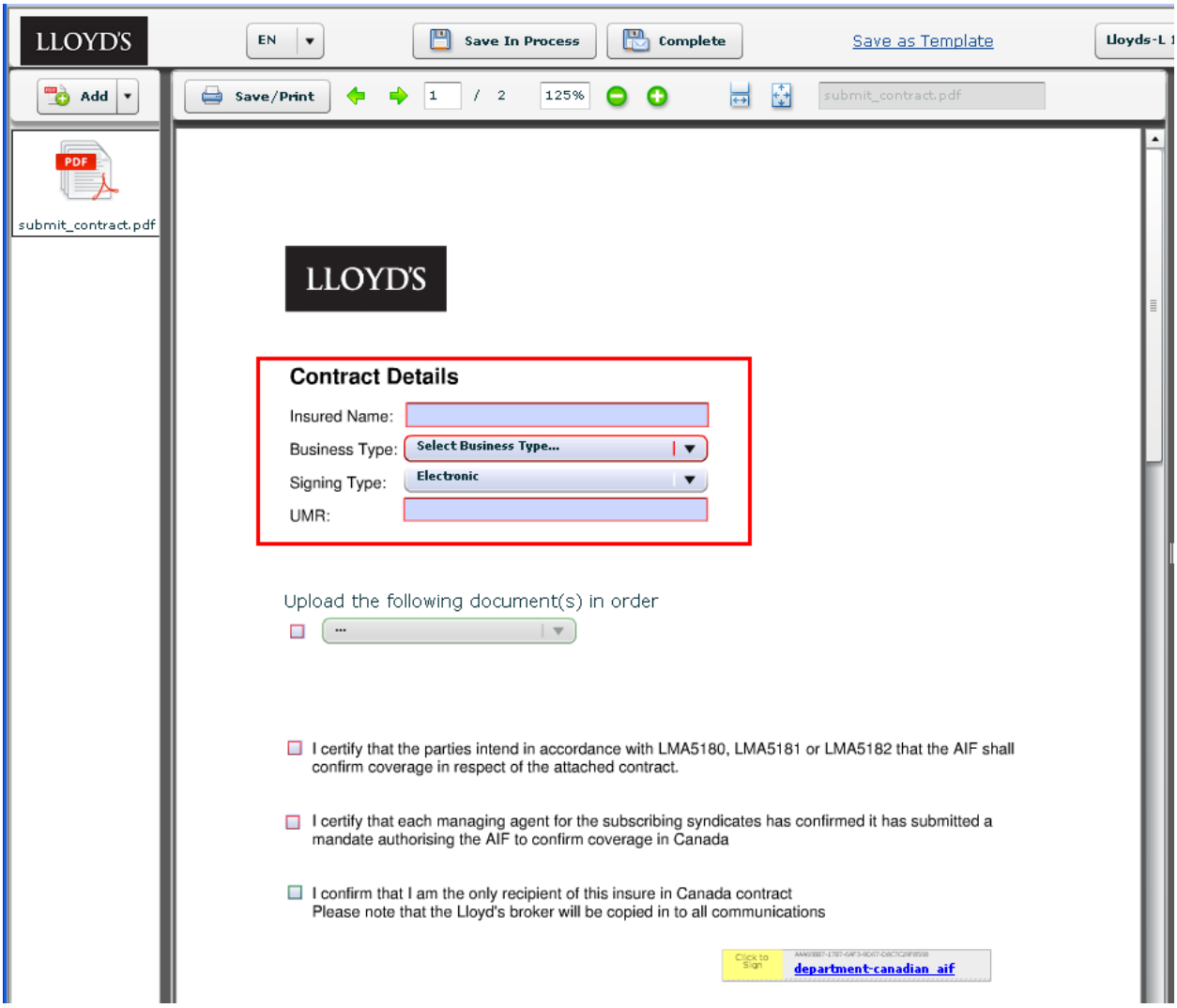
On the Dashboard select the “Submit eForm” icon located within the “Templates” subsection.

This opens the “Submit eForm” in a new window.

A contract can be submitted either electronically or via Wet Signature.

### 3.1 Submitting a contract electronically

Complete the fields listed under “Contract Details.”


LLOYD'S
EN
Save In Process
Complete
Save as Template
Add
Save/Print
1 / 2
125%
submit_contract.pdf
submit_contract.pdf
LLOYD'S
Contract Details
Insured Name:
Business Type:
Select Business Type...
Signing Type:
Electronic
UMR:
Upload the following document(s) in order
I certify that the parties intend in accordance with LMA5180, LMA5181 or LMA5182 that the AIF shall confirm coverage in respect of the attached contract.
I certify that each managing agent for the subscribing syndicates has confirmed it has submitted a mandate authorising the AIF to confirm coverage in Canada
I confirm that I am the only recipient of this insure in Canada contract
Please note that the Lloyd's broker will be copied in to all communications
department-canadian_aif

Note that when Global Direct and Global Reinsurance are selected, at least two attachments are required and the sequence of attachments is important.

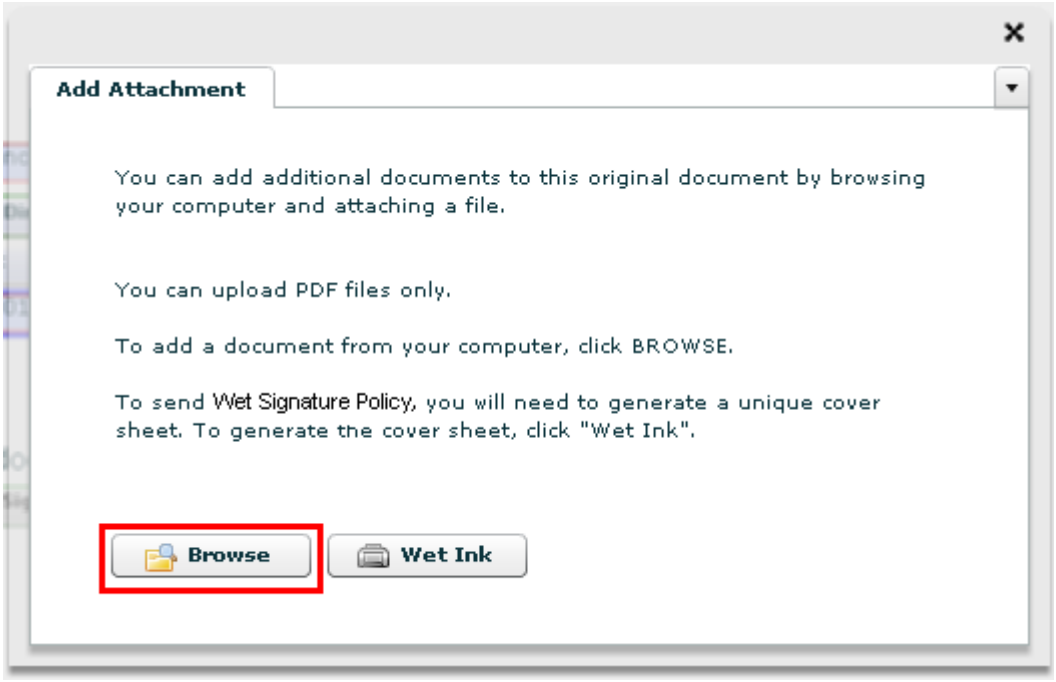
In “Signing Type,” select “Electronic.”

Click on the “Add” icon ( ) located at the top left of the screen.



Select “Non-Signed Attachment.”

Doing so opens a window. Select “Browse.”


Add Attachment
You can add additional documents to this original document by browsing your computer and attaching a file.
You can upload PDF files only.
To add a document from your computer, click BROWSE.
To send Wet Signature Policy, you will need to generate a unique cover sheet. To generate the cover sheet, click "Wet Ink".
Browse
Wet Ink

Attach the appropriate file. Note that **only PDF** files can be uploaded in this manner.

Once the file is attached, select the checkbox to the left of the “Canadian Contract for Signing” field.

Selecting the checkbox before attaching a file will result in an error message. A file must be attached before the checkbox can be selected.

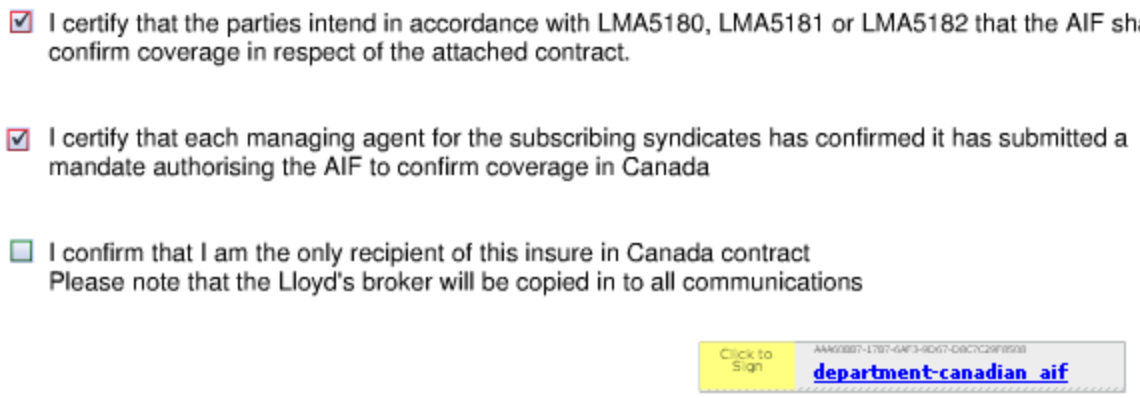
Note that in the case of Global Direct and Global Reinsurance business types, at least two documents will be attached and the order in which they are attached is important.

You will be prompted to attach each document. After attaching the first document, the “Canadian Contract for Signing,” a new checkbox will appear next to a new drop down prompting you to attach the second document, the “Global Contract.”

Attached files will be displayed on the left hand side of the screen.

Select the second and third checkboxes. Selecting these checkboxes is required. Selecting these checkboxes certifies that the submitted contract includes the required LMA wording.

**NOTE**: Contracts that do not include the required LMA wording—LMA5180, LMA5181, or LMA5182—will not be bound.

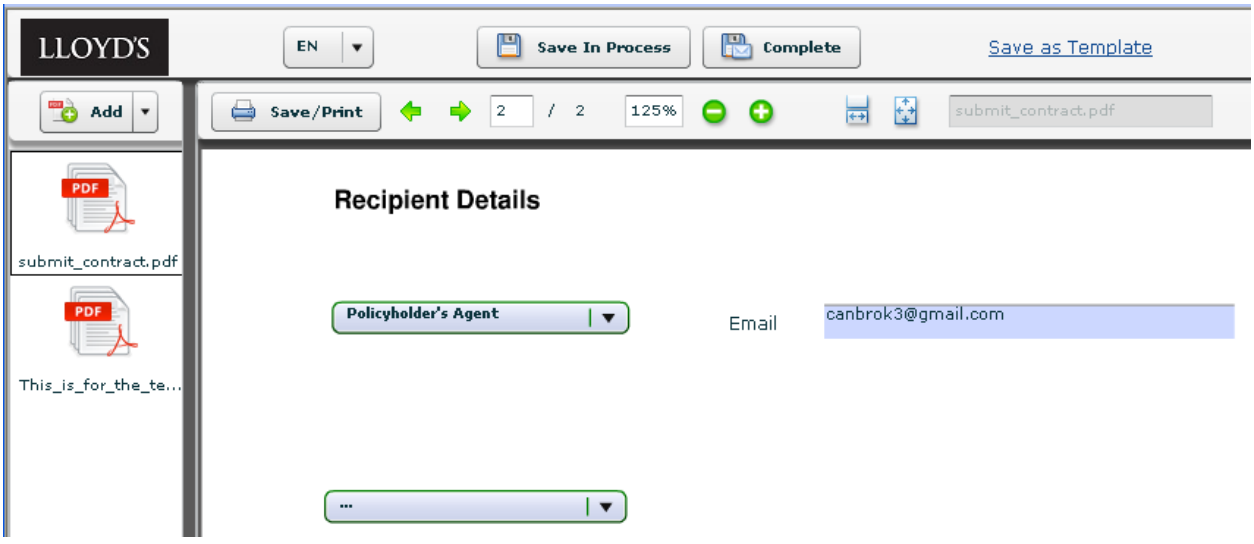

I certify that the parties intend in accordance with LMA5180, LMA5181 or LMA5182 that the AIF shall confirm coverage in respect of the attached contract.
I certify that each managing agent for the subscribing syndicates has confirmed it has submitted a mandate authorising the AIF to confirm coverage in Canada
I confirm that I am the only recipient of this insure in Canada contract
Please note that the Lloyd's broker will be copied in to all communications
Click to Sign
department-canadian_aif

Selecting the last checkbox confirms that you are the only recipient of the contract. If you are not the only recipient, leave the checkbox unselected.

**NOTE**: The facility which allows the submitting broker to designate himself as the receiving broker should only be utilised where the submitting broker is the policyholder's agent, for example where there is a global placement. If submitters are unsure who is the policyholder's agent they should contact LITA in the first instance.

If the last checkbox is left unselected, the "Recipient Details" section will appear on the second page of the "Submit eForm."

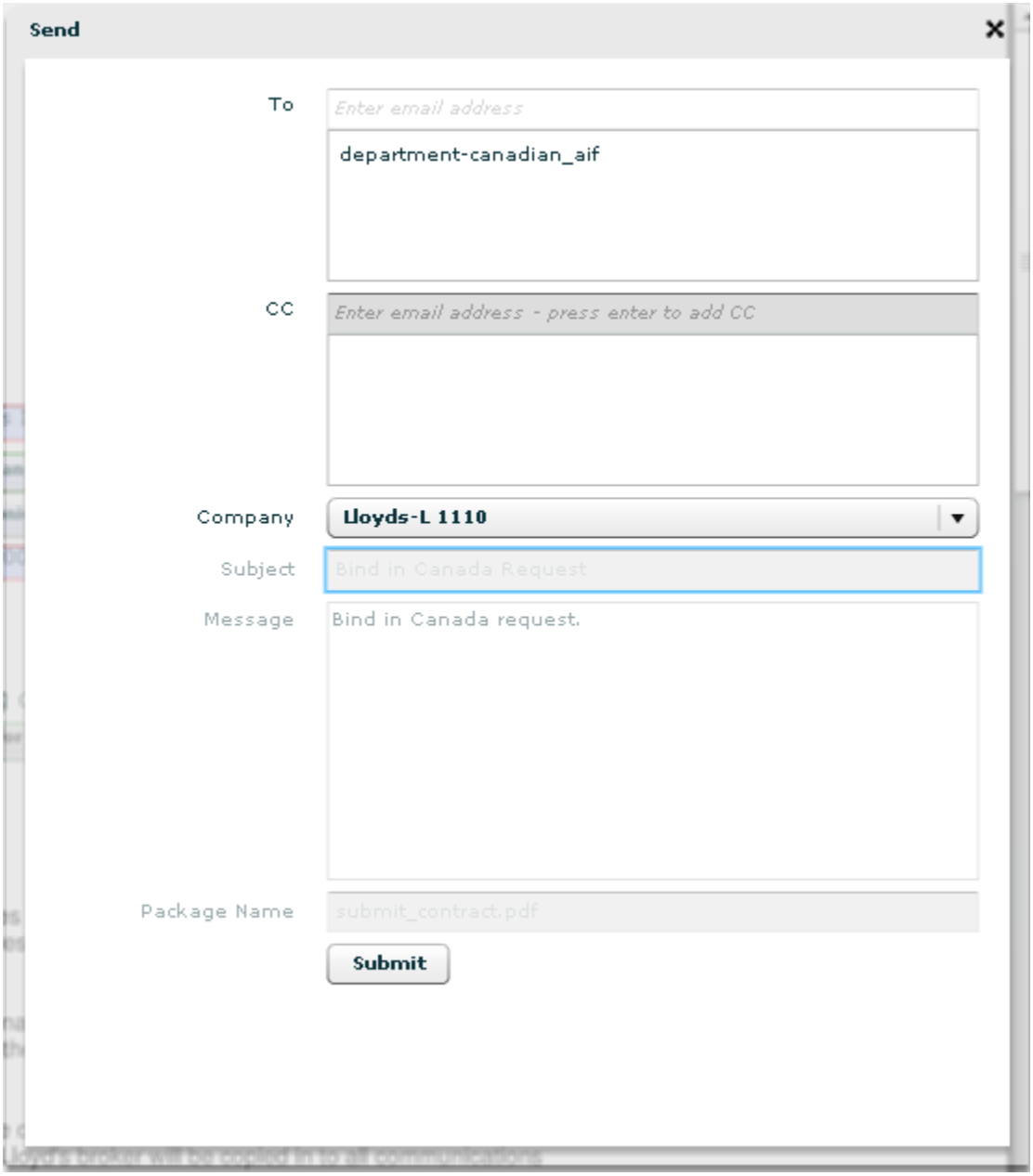
Fill in the relevant fields with information for all other recipients.



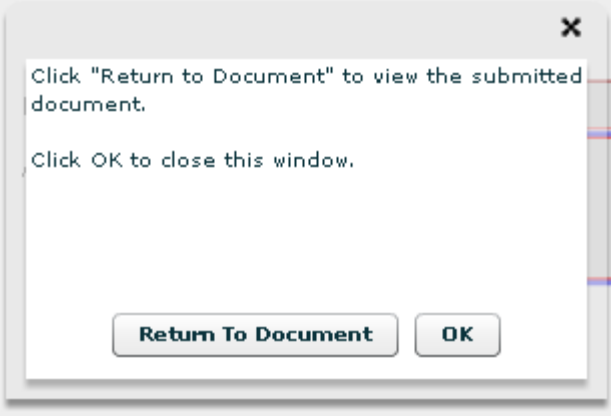

Once the fields have been completed, the document or documents (in the case of Global Direct and Global Reinsurance contracts) have been attached, and the proper checkboxes have been selected, you can click "Complete" located at the top of the screen.

This opens a new window. Click “Submit.”

No other information included in this window is used.




Clicking “Submit” will open a final window. If you still wish to review the contract, click “Return to Document.” If you are done, click “Exit.”




Your contract has been submitted. It can now be viewed through the AIF Signing System.

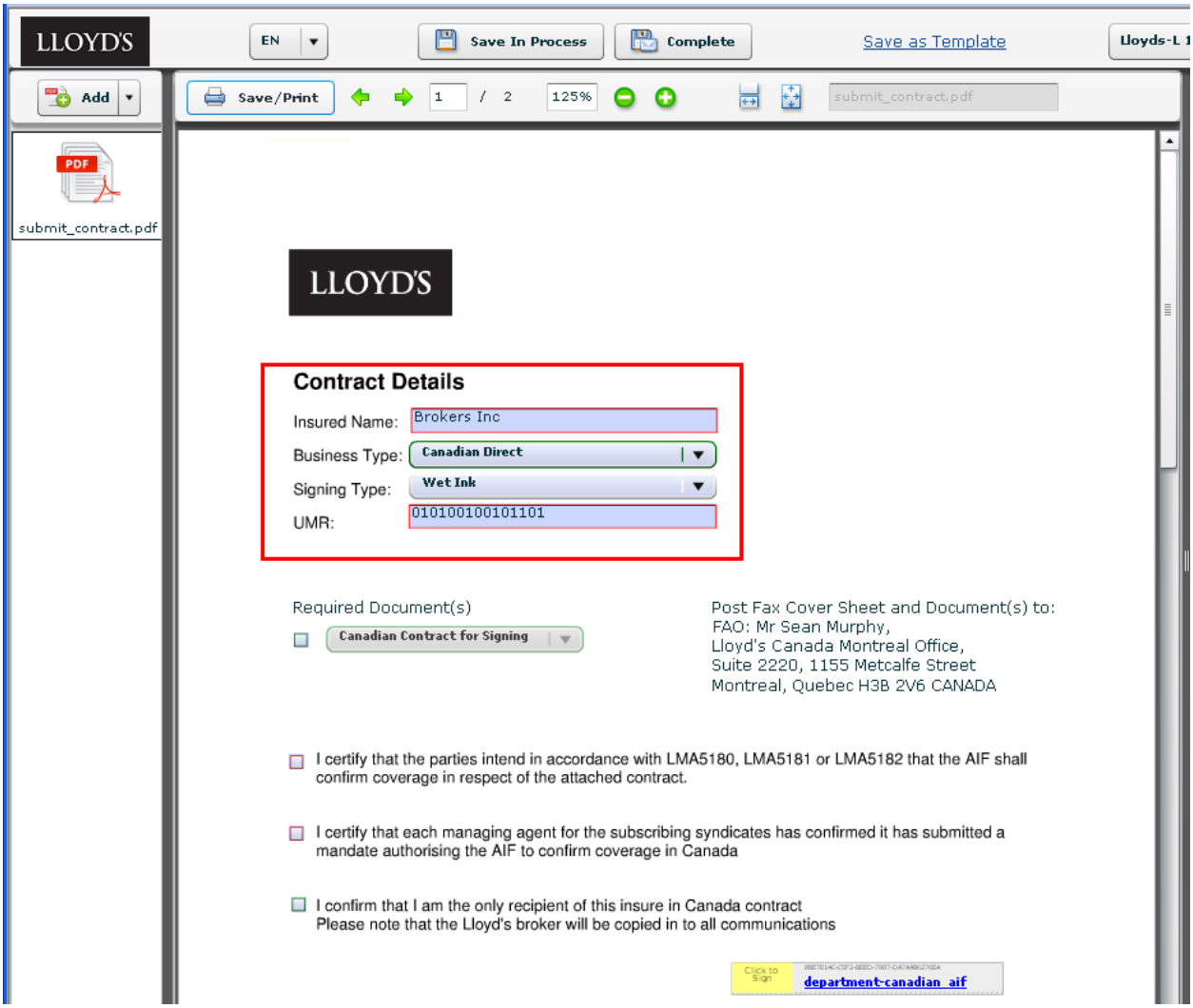
Once an e-form submission has been processed by the Canadian AIF, a completion e-mail will be sent to the submitting User and Super User.

A contract can be reviewed by clicking on the link included in this completion e-mail.

### 3.2 Submitting a contract via Wet Signature

Open the Submit eForm.

Complete the fields listed under “Contract Details.”


LLOYD'S
EN
Save In Process
Complete
Save as Template
Add
Save/Print
1 / 2
125%
submit_contract.pdf
submit_contract.pdf
LLOYD'S
Contract Details
Insured Name: Brokers Inc
Business Type: Canadian Direct
Signing Type: Wet Ink
UMR: 010100100101101
Required Document(s)
Canadian Contract for Signing
Post Fax Cover Sheet and Document(s) to:
FAO: Mr Sean Murphy,
Lloyd's Canada Montreal Office,
Suite 2220, 1155 Metcalfe Street
Montreal, Quebec H3B 2V6 CANADA
I certify that the parties intend in accordance with LMA5180, LMA5181 or LMA5182 that the AIF shall confirm coverage in respect of the attached contract.
I certify that each managing agent for the subscribing syndicates has confirmed it has submitted a mandate authorising the AIF to confirm coverage in Canada
I confirm that I am the only recipient of this insure in Canada contract
Please note that the Lloyd's broker will be copied in to all communications
Click to Sign
department-canadian_aif

In “Signing Type” select “Wet Ink.”

Click on the “Add” icon ( ) located at the top left of the screen.


Select “Non-Signed Attachment.”

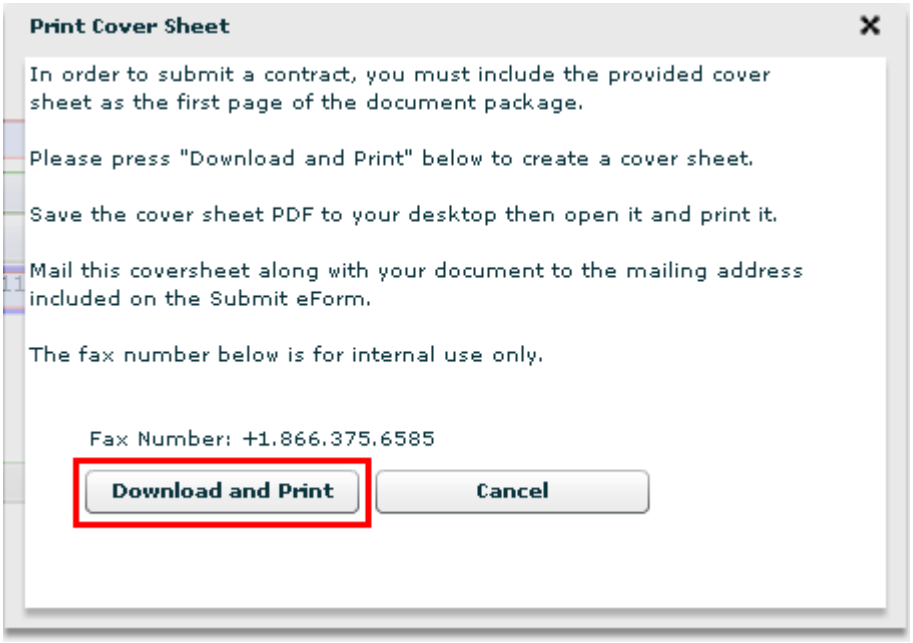
Doing so opens a window. Select “Wet Ink.”

Add Attachment
You can add additional documents to this original document by browsing your computer and attaching a file.
You can upload PDF files only.
To add a document from your computer, click BROWSE.
To send a Wet Signature Policy, you will need to generate a unique cover sheet. To generate the cover sheet, click "Wet Ink".
Browse
Wet Ink

A second window appears prompting you to create a unique cover sheet.

The cover sheet is required and should be included as the first or last page of the document package. The cover sheet is provided for you.

To generate the cover sheet, click “Download and Print”

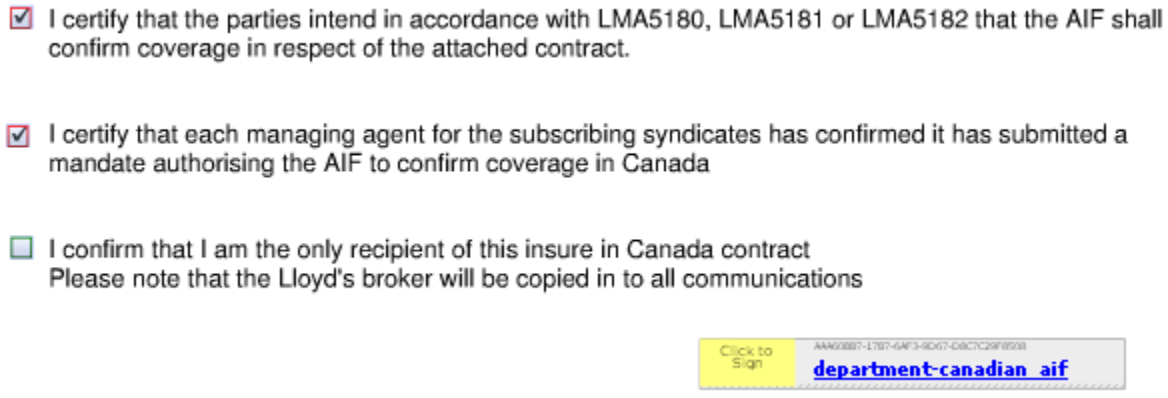

Print Cover Sheet
In order to submit a contract, you must include the provided cover sheet as the first page of the document package.
Please press "Download and Print" below to create a cover sheet.
Save the cover sheet PDF to your desktop then open it and print it.
Mail this coversheet along with your document to the mailing address included on the Submit eForm.
The fax number below is for internal use only.
Fax Number: +1.866.375.6585
Download and Print
Cancel

The cover sheet contains a unique QR code. A QR code is similar to a bar code and used by the AIF to input your submission into the system.

coverSheet[1].pdf - Adobe Reader
File Edit View Document Tools Window Help
LLOYD'S
Wet Ink Coversheet
Lloyds Inc. Canadian AIF Signing System: +1.866.640.3878

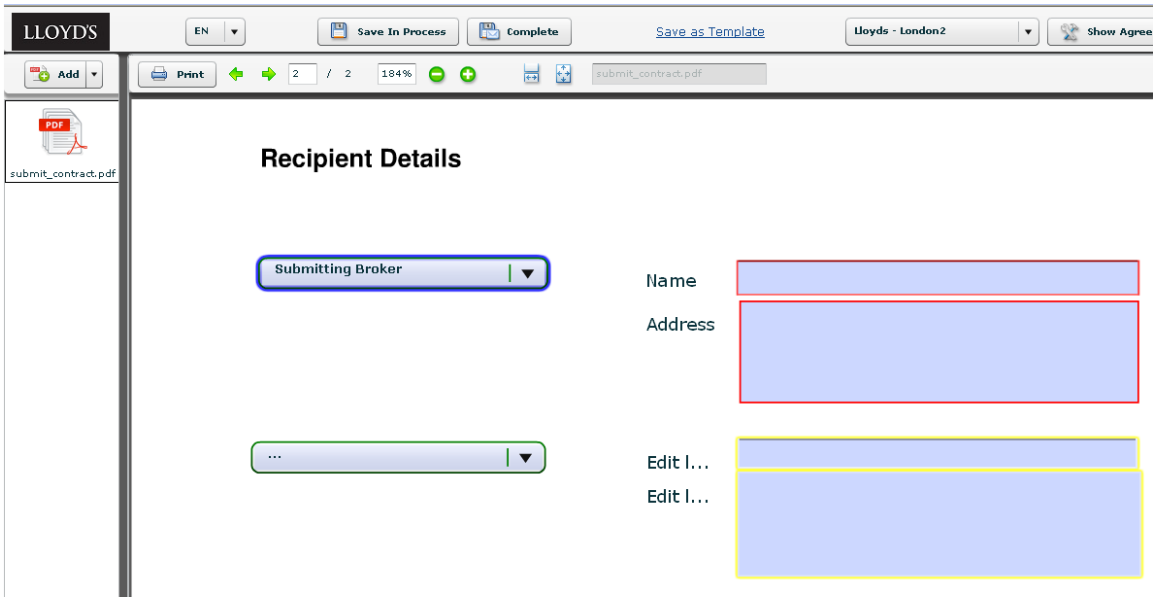
Please note that the listed fax number is for internal use only.

Select the second and third checkboxes. Selecting these checkboxes is required.


I certify that the parties intend in accordance with LMA5180, LMA5181 or LMA5182 that the AIF shall confirm coverage in respect of the attached contract.
I certify that each managing agent for the subscribing syndicates has confirmed it has submitted a mandate authorising the AIF to confirm coverage in Canada
I confirm that I am the only recipient of this insure in Canada contract
Please note that the Lloyd's broker will be copied in to all communications
Click to Sign
department-canadian_aif

To submit using Wet Signature, do not select the third item in order for the recipient details to be generated on Page 2 of the “Submit eForm.”

Complete the name and address for each recipient.




Select “Complete” located at the top of the screen.

Mail your document package, including the above-mentioned cover sheet, to:

FAO: Mr. Sean Murphy
Lloyd’s Canada Montreal Office
Suite 2220, 1155 Metclafe Street
Montreal, Quebec H3B 2V6 CANADA

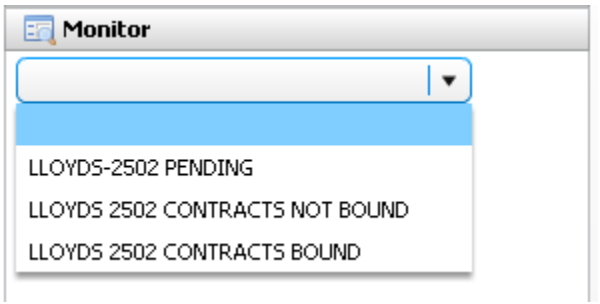
# HOW TO REVIEW A SUBMITTED CONTRACT

A submitted contract can be viewed either by e-mail or through the AIF Signing System.

### 4.1 Reviewing a contract submissions through the AIF System

From the Home Page, select “Monitor” on the left hand side of the screen.

In the dropdown, you are given three options.



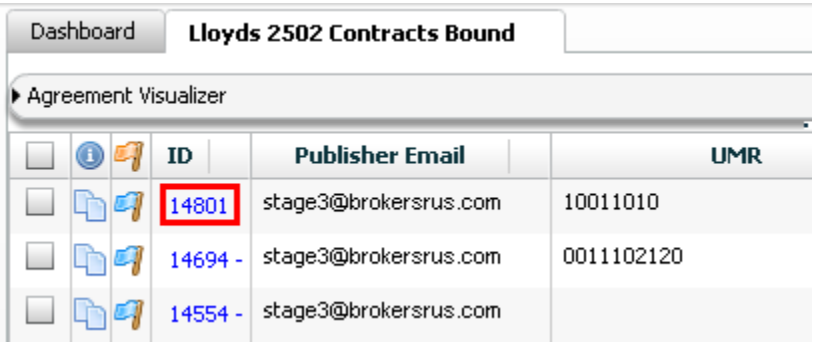

Select “Pending” to view all submitted contracts that have not yet been processed by the Canadian AIF.

Select “Contracts Not Bound” to view all submitted contracts that have been deemed “Do Not Bind” by the Canadian AIF.

Select “Contracts Bound” to see all submitted contracts that have been deemed “Bind in Canada” by the Canadian AIF.

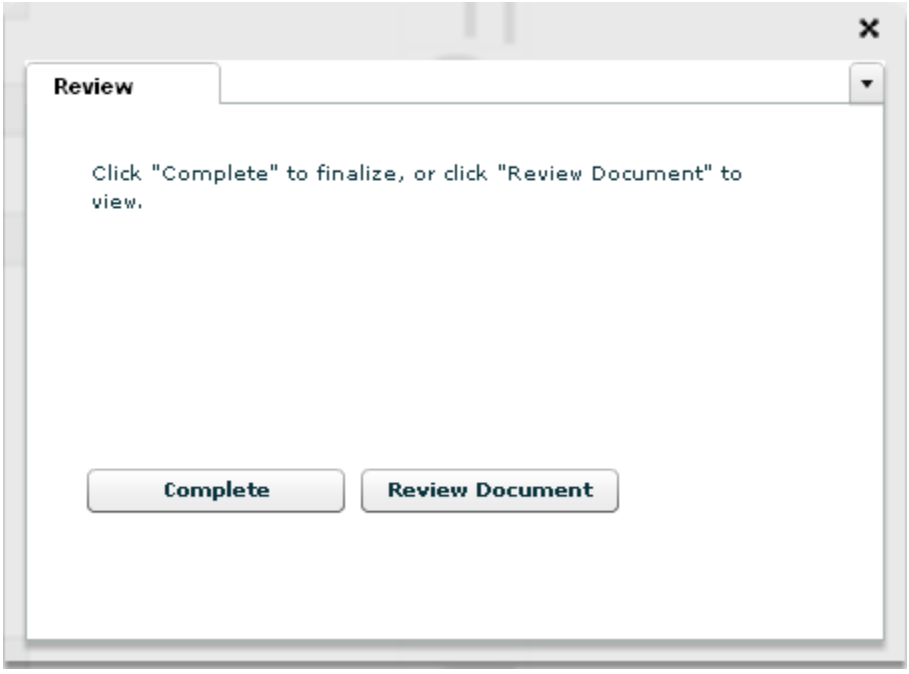
In all three sections, a User can view all contracts they have submitted. A Super User can view all contracts submitted for the company.

Click on a contract's ID number to review it.



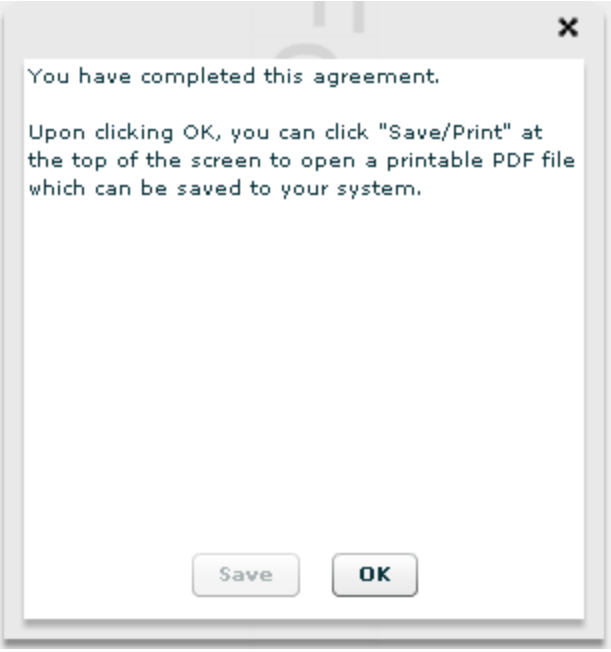

This opens the document in a new window or tab, depending on your browser.

Upon opening a contract for review, you will be prompted to click "Complete." Doing so logs a review acknowledgement, as tracked by the Canadian AIF, indicating that you have opened and reviewed the contract.




If you wish to review the contract without sending an acknowledgement, click on "Review Document."

Once you have clicked "Complete," a final window will appear, confirming that you have completed the agreement. Click "OK."


You have completed this agreement.
Upon clicking OK, you can click "Save/Print" at the top of the screen to open a printable PDF file which can be saved to your system.
Save
OK

A submitted contract cannot be edited or otherwise altered, though the icon array at the bottom of the screen allows you to perform a variety of tasks.

### 4.2 Reviewing a contract submission by e-mail

A submitted contract can be viewed either by e-mail or through the AIF Signing System.

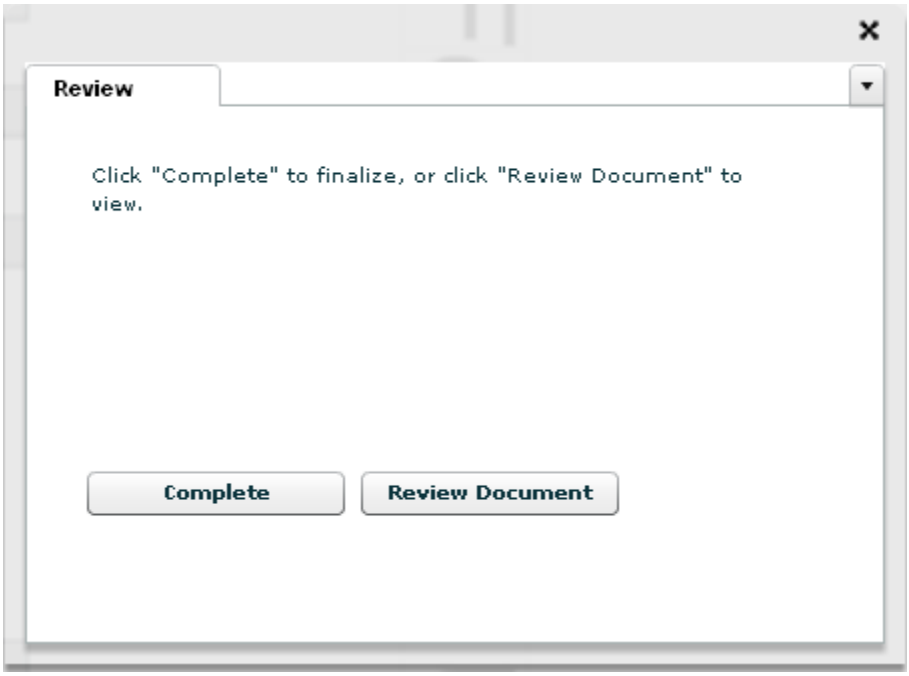
To view a submitted contract by e-mail, click on the link provided in the completion e-mail sent to submitting User once an e-form submission has been processed by the Canadian AIF.

The outcome will be listed in the e-mail's subject line.

Click on the "submit_contract.pdf" link within the e-mail to review the submitted contract.

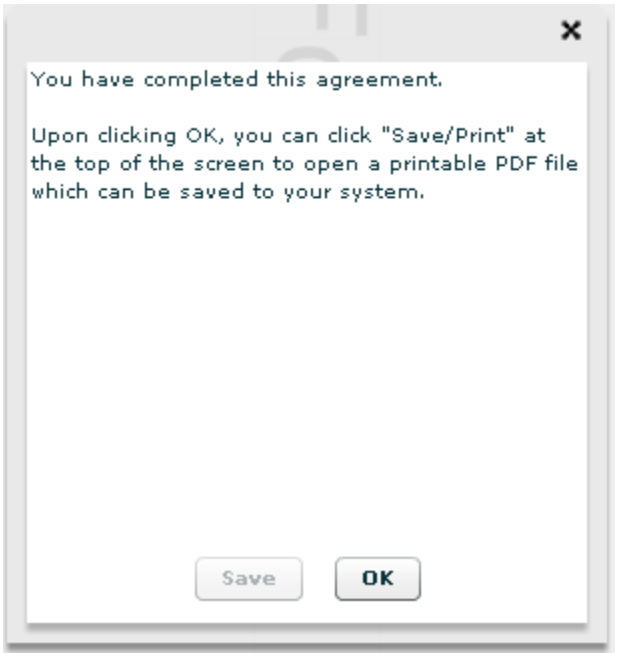
This opens a new window or tab, depending on your browser, displaying the submitted eForm.

Upon opening a contract for review, you will be prompted to click "Complete." Doing so logs a review acknowledgement, as tracked by the Canadian AIF, indicating that you have opened and reviewed the contract.




If you wish to review the contract without sending an acknowledgement, click “Review Document.”

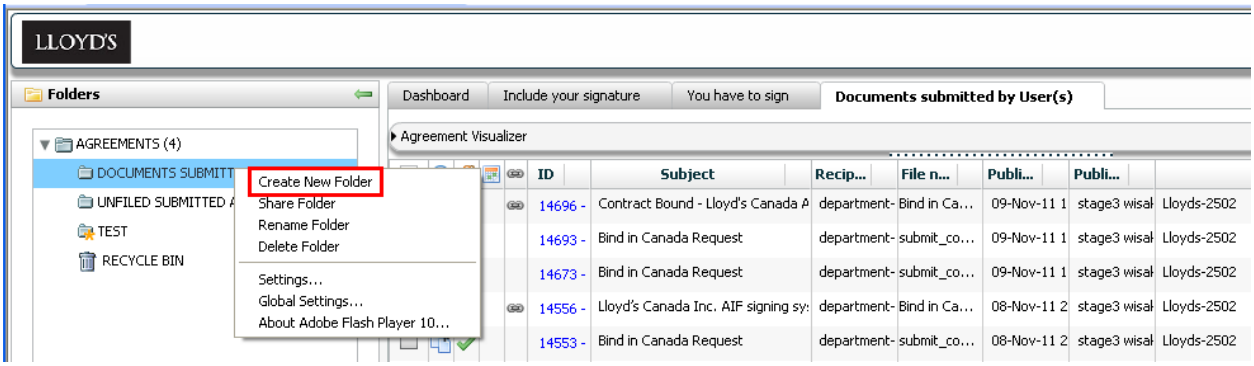
Once you have clicked “Complete,” a final window will appear, confirming that you have completed the agreement. Click “OK.”


You have completed this agreement.
Upon clicking OK, you can click "Save/Print" at the top of the screen to open a printable PDF file which can be saved to your system.
Save
OK

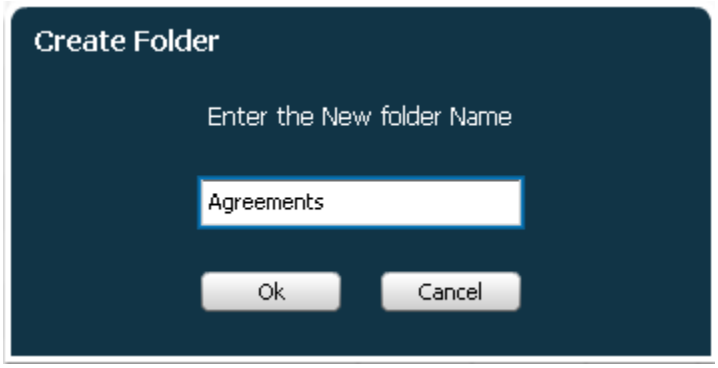
### 4.3 Managing contracts

You can manage your contracts much as you do e-mails.

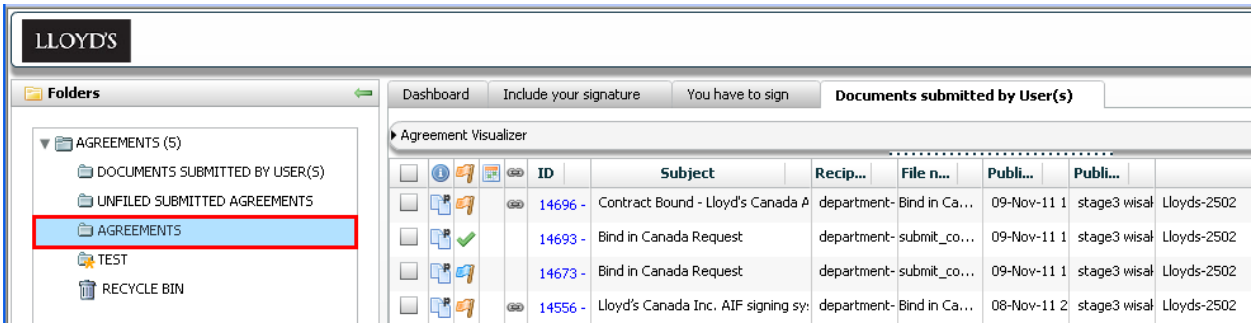
Right click on “Documents Submitted by User(s)” to open a dropdown menu.


LLOYD'S
Folders
Dashboard
Include your signature
You have to sign
Documents submitted by User(s)
Agreement Visualizer
AGREEMENTS (4)
DOCUMENTS SUBMITT
UNFILED SUBMITTED A
TEST
RECYCLE BIN
Create New Folder
Share Folder
Rename Folder
Delete Folder
Settings...
Global Settings...
About Adobe Flash Player 10...
ID
Subject
Recip...
File n...
Publi...
14696 - Contract Bound - Lloyd's Canada A department- Bind in Ca... 09-Nov-11 1 stage3 wisak Lloyds-2502
14693 - Bind in Canada Request department- submit_co... 09-Nov-11 1 stage3 wisak Lloyds-2502
14673 - Bind in Canada Request department- submit_co... 09-Nov-11 1 stage3 wisak Lloyds-2502
14556 - Lloyd's Canada Inc. AIF signing sy: department- Bind in Ca... 08-Nov-11 2 stage3 wisak Lloyds-2502
14553 - Bind in Canada Request department- submit_co... 08-Nov-11 2 stage3 wisak Lloyds-2502

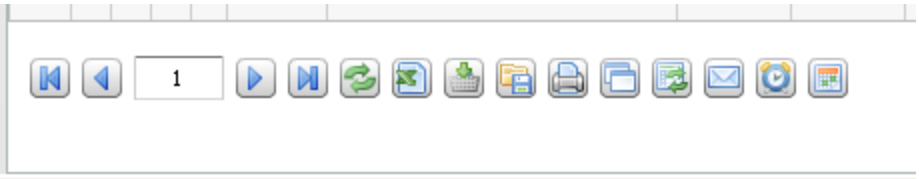
Select “Create New Folder” and enter a folder name. Click “OK.”

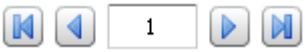



You can now drag contracts from any section to your new folder.


LLOYD'S
Folders
Dashboard
Include your signature
You have to sign
Documents submitted by User(s)
Agreement Visualizer
AGREEMENTS (5)
DOCUMENTS SUBMITTED BY USER(S)
UNFILED SUBMITTED AGREEMENTS
AGREEMENTS
TEST
RECYCLE BIN
ID
Subject
Recip...
File n...
Publi...
14696 - Contract Bound - Lloyd's Canada A department- Bind in Ca... 09-Nov-11 1 stage3 wisak Lloyds-2502
14693 - Bind in Canada Request department- submit_co... 09-Nov-11 1 stage3 wisak Lloyds-2502
14673 - Bind in Canada Request department- submit_co... 09-Nov-11 1 stage3 wisak Lloyds-2502
14556 - Lloyd's Canada Inc. AIF signing sy: department- Bind in Ca... 08-Nov-11 2 stage3 wisak Lloyds-2502

The icon array at the bottom of the screen allows you to perform a variety of tasks.



 The “Navigation” icon allows you to navigate between pages. This icon function is only applicable if the number of contracts spans more than one page.

The “Refresh” icon refreshes the contracts list. It is recommended that you click the “Refresh Icon” before and after making a change to the list.

The “Export to Excel” icon allows you to save selected agreements to an Excel spreadsheet.

The “Archive” icon allows you to archive selected agreements to your computer as PDF files. It is recommended that this tool be used by Super Users to save all contracts to their computer or system.

The “Print” icon opens a selected agreement as a printable PDF document.

The “Forward by E-mail” icon allows you to send a copy of a selected contract to any e-mail address. This tool can only be used after a contract has been bound.

With the exception of the “Navigation” icon and “Refresh” icon, a contract must be selected before the icon functions can be applied.

Click on a contract to select it.

# GLOSSARY

### 5.1 Super User

A Super-user is assigned to the AIF Signing Process by their company and acts as the administrator for their company and the registered users of their company.

### 5.2 User

A submitting broker

In the AIF System, the User is also referred to as “Publisher.”

### 5.3 Wet Signature

Used when a wet signature is required

Contract packages are mailed to the Canadian AIF

### 5.4 QR code

A unique code assigned to all contracts submitted via Wet Signature

### 5.5 Business Types

#### 5.5.1 Canadian Direct

Where the risk or the insured is located in Canada only

#### 5.5.2 Canadian Reinsurance

Where the coverage provided is for a Cedant located in Canada only

#### 5.5.3 Global Direct

A multi-jurisdictional policy where one or more risk or insured's are located in Canada

#### 5.5.4 Global Reinsurance

A multi-jurisdictional policy where one or more Cedant's are located in Canada